



COD Implementation Project Kick-Off and Celebration



The Next Phase:
Design Develop Deploy



COD Implementation Project Kick-Off and Celebration



AGENDA

Opening Remarks

Team Introductions and Welcome

Modernization Partner Overview

COD Overview

***** *BREAK* *****

Partner Introductions

TSYS Overview

AFSA Overview

COD Partnership

COD and the SFA Service Standards

Closing Remarks





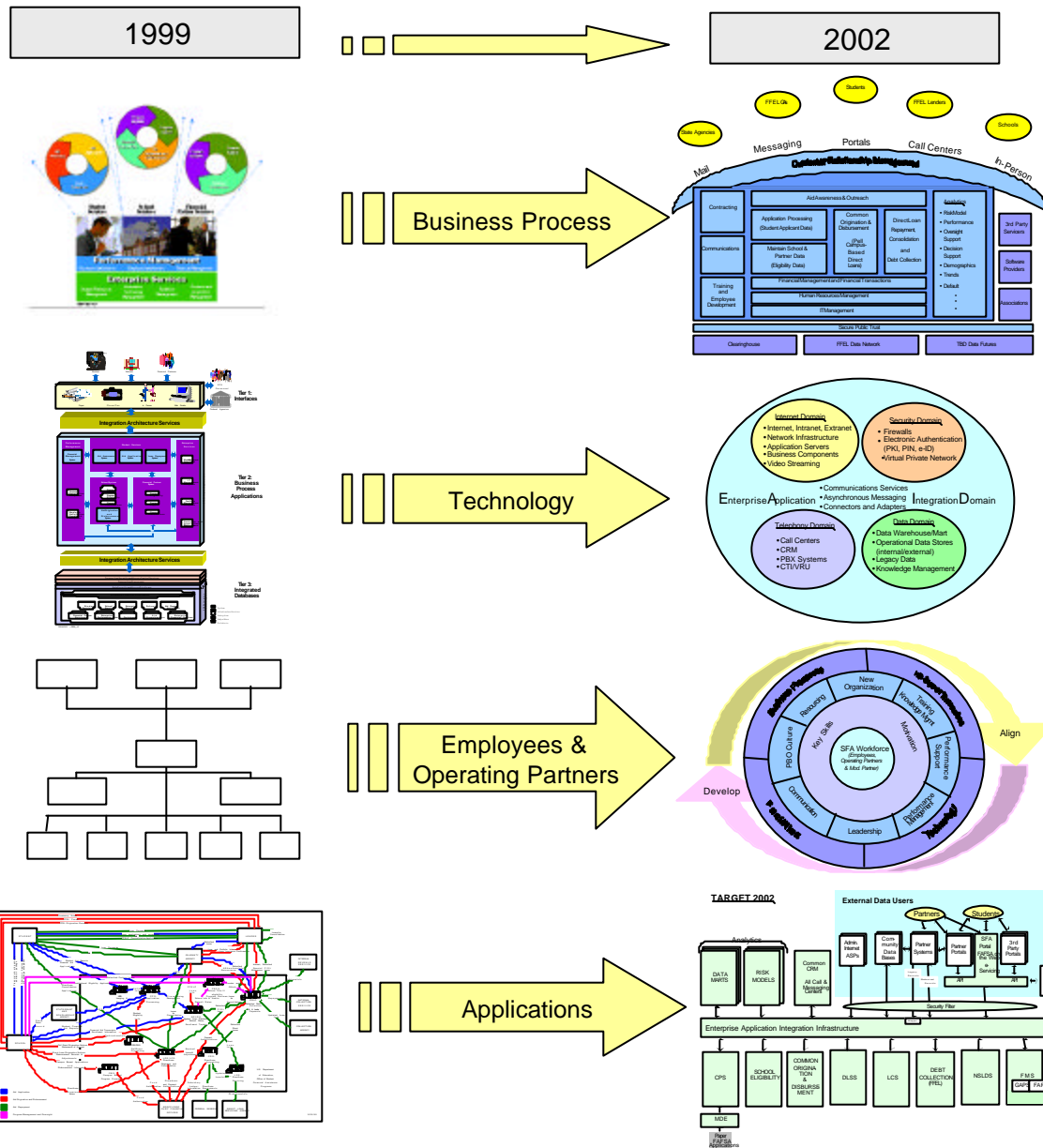
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Modernization Partner Overview



Steve Shane





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Common Origination and Disbursement: A Strategic Overview



Mary Haldane



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The Goal:

To get the right
funds to the right
students, at the
right time.



INSTITUTION SOLUTION

- - - Packaged Solution
- EDEXpress
- - - Homegrown System

Export Data Files

STU Elig/ Demogr.

Pell

FSEOG

FWS

Perk

Direct

Aggregates for FISAP

CPS

RFMS

CBS

LOS

Loan Servicing

FFEL

FFEL GAs/ Lenders

via batch

PEPS

TIV Inst DB

NSLDS

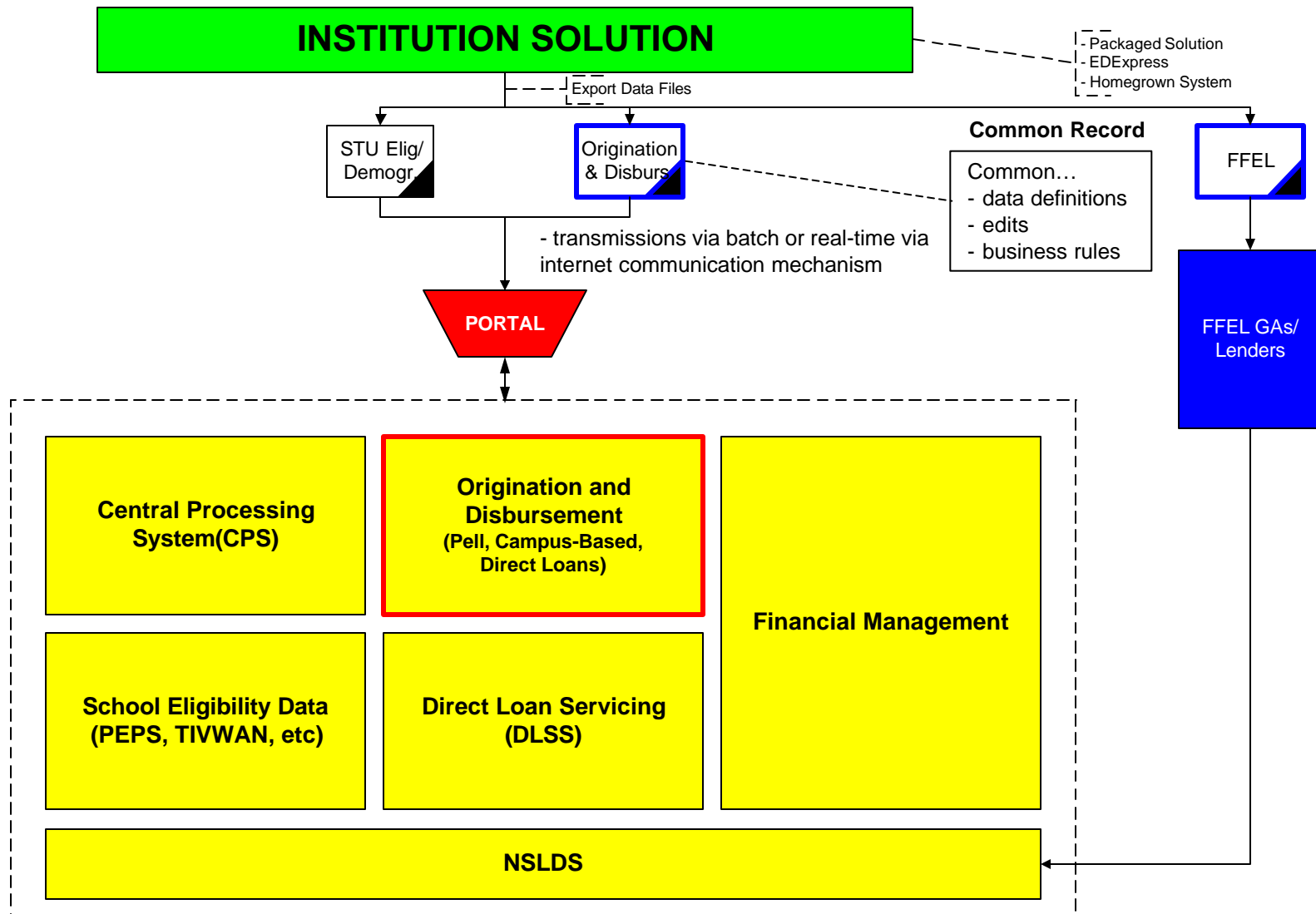
GAPS



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Future Environment



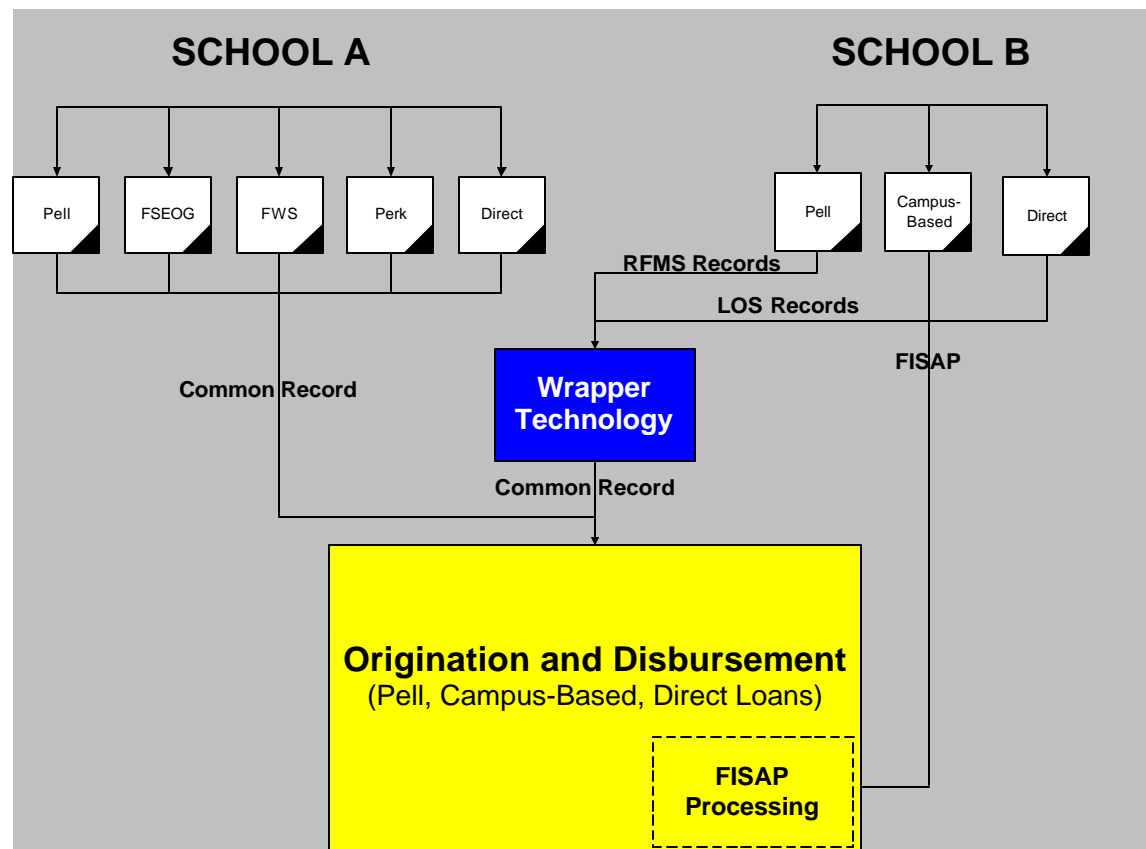


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Transition: “Middleware”

Integration tool that will accept current record layouts and convert them into a “common record” format, allowing schools to migrate to the COD process as they are ready.

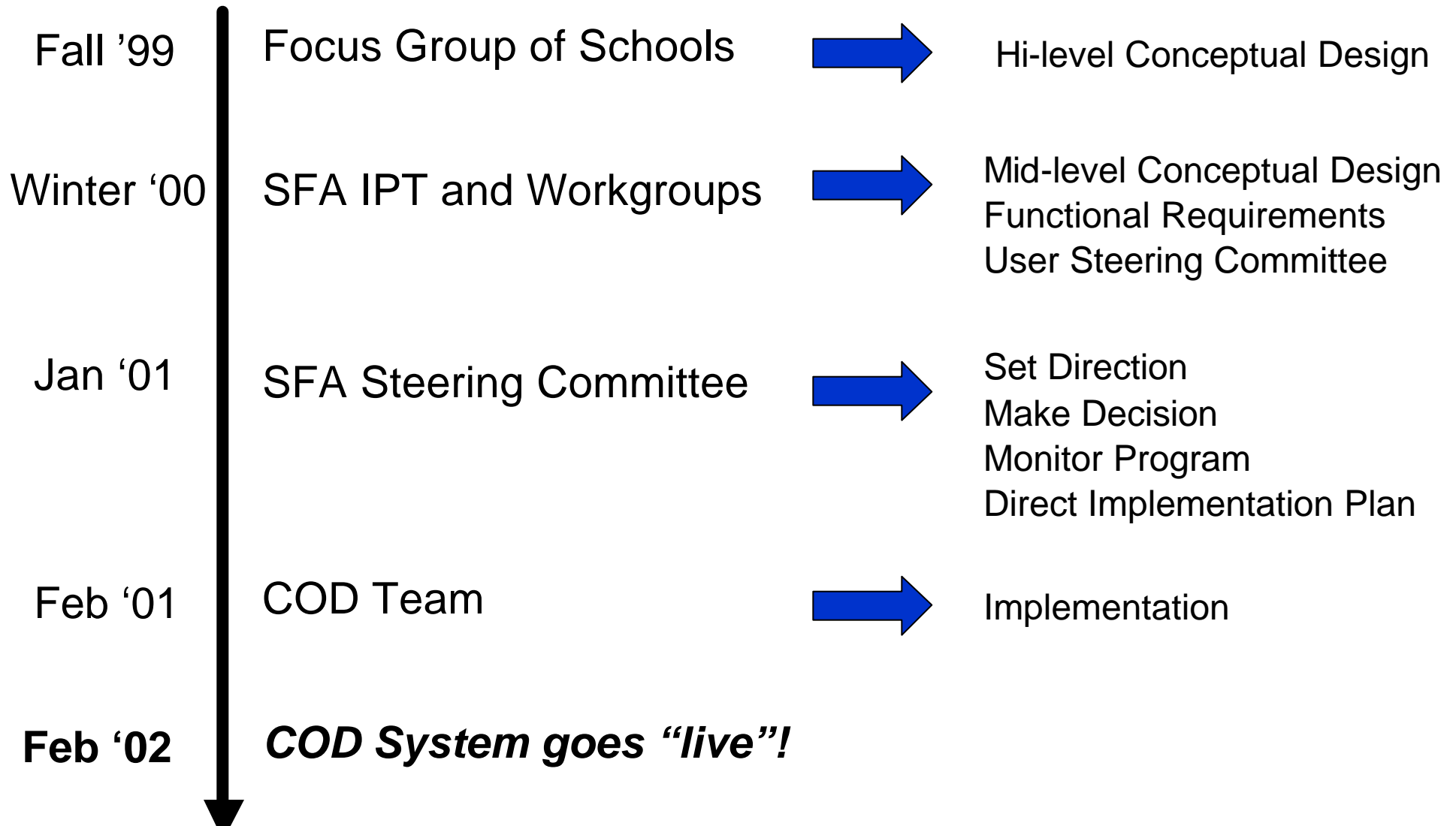




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COD Timeline





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COD Community Outreach

Who?

- School Administrators
- Financial Partners
- Professional Associations
- Third Party Vendors and Servicers

How?

- Conference Presentations
- Individual Meetings
- Membership on COD Workgroups
- User Steering Committee



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Break

(15 Minutes)



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Total System Overview



Connie Dudley



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AFSA Data Corporation Overview



Sue Szabo
Doug Tinder



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COD Partnership Overview



Gene Murphy



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In addition to industry and business expertise, each COD partner brings strong partnership qualities:

Team Player

- Collaborative approach
- Commitment to long-term relationship
- Confidence in, and accountability for, measurable results and performance

Industry Acumen

- Best in functional and technical knowledge and support
- Commitment to Higher Education industry

Thought Leadership

- Demonstrated nimbleness in thought and structure
- Provide high quality service



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COD Partner Roles

SFA

- Financial aid origination and disbursement expertise
 - Higher Education industry expertise
 - Knowledge of Title IV regulations
 - Relationship with Financial Aid Administrators
 - Knowledge of existing resource capabilities and constraints
- (knowledge of Title IV, knowledge of schools, knowledge of industry)*

Modernization Partner (Accenture and KPMG Consulting)

- Understanding of SFA and COD vision
 - Program management of large change programs
 - Methodology to implement change programs
 - Schools and TIV knowledge
 - Integration of Alliance Partners
- (knowledge of Title IV, relationship with SFA, methodology expertise)*

Operations Partner (EDS)

- Transition of RFMS and LOS functions to COD solution
 - Requirement gathering support
 - Expertise in Call Center transition and operations
- (knowledge of Title IV and current processes, extensive work with SFA)*

Customer Service Partner (AFSA)

- Develop COD customer support solution
 - Provide Higher Education knowledge in development efforts
 - Support design and development team with functional expertise
- (knowledge of Title IV, knowledge of schools processes)*

Technology Solution Partner (Total System)

- Supply technology solution
 - Design and develop technical application as platform for COD
 - Provide technical/help-desk support
 - Provide reporting capability
- (technology, high volume transaction processing, customer focus)*



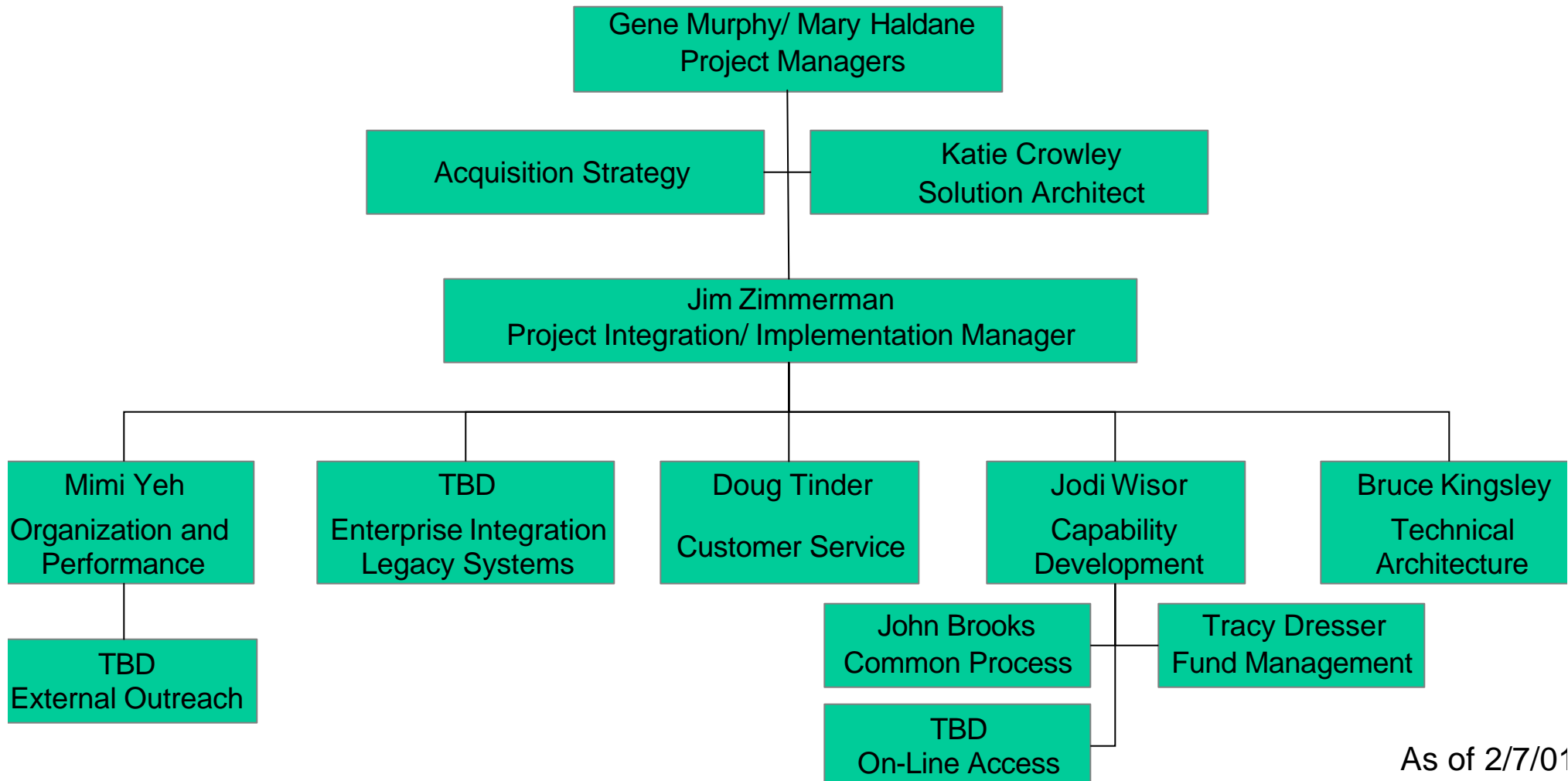
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COD Organization Chart

Executive Sponsor: Kay Jacks

Modernization Partner Lead: Steve Shane



As of 2/7/01

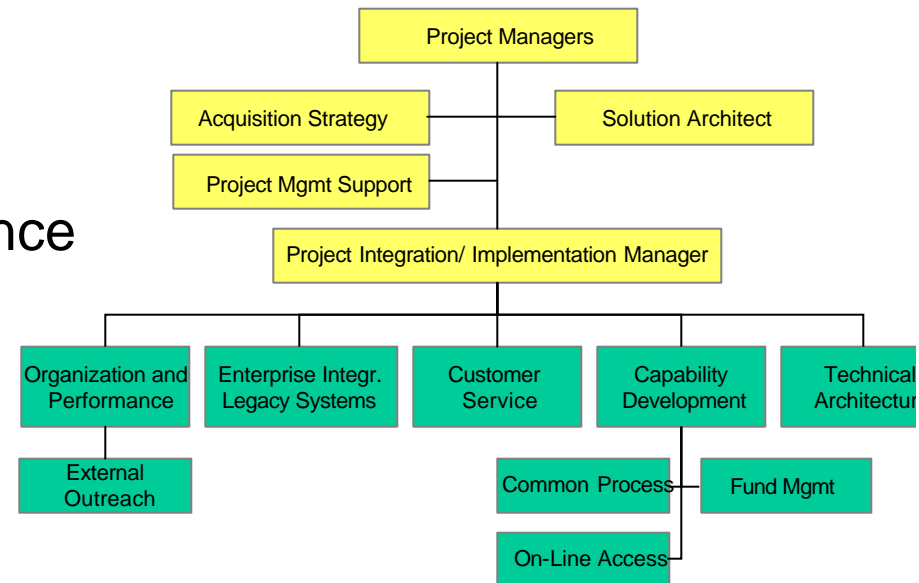


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COD Project Management

- High-Level Workplan Management
- Task Order Development & Maintenance
- Mod Partner Financial Oversight
- Resourcing
- Risk & Issue Resolution



Project Integration/ Implementation Management

- Provide Guidance to Teams
- Oversee Implementation Plan
- Internal COD Decision Board

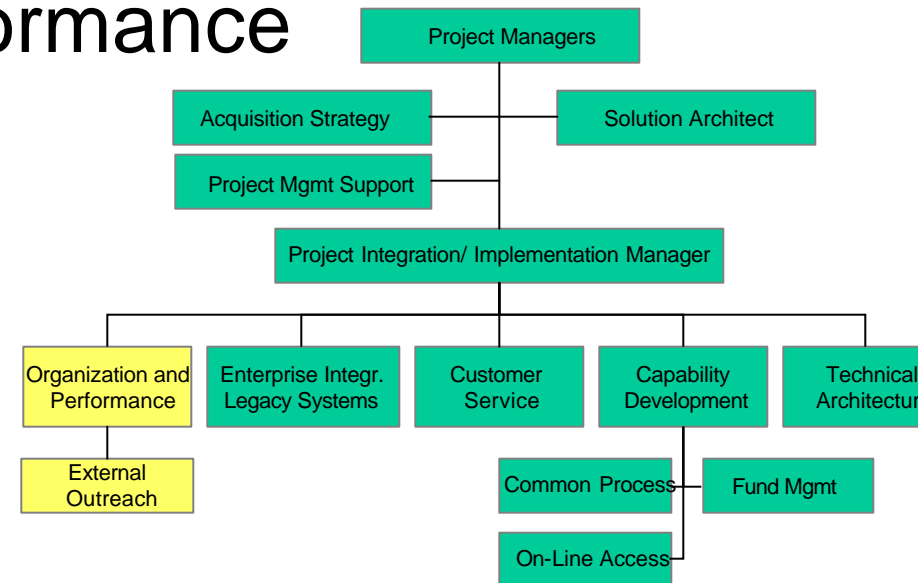


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Organization and Human Performance

- Communication Program
- Outreach – Main COD Messages
- Performance Support
 - Change Readiness Assessment
 - Organization Strategy
 - Training



External Outreach

- Lead User Steering Committee
- Coordinating Points of Contact for Events
 - Schools
 - Associations
 - Financial Partners, 3rd Party Service Providers

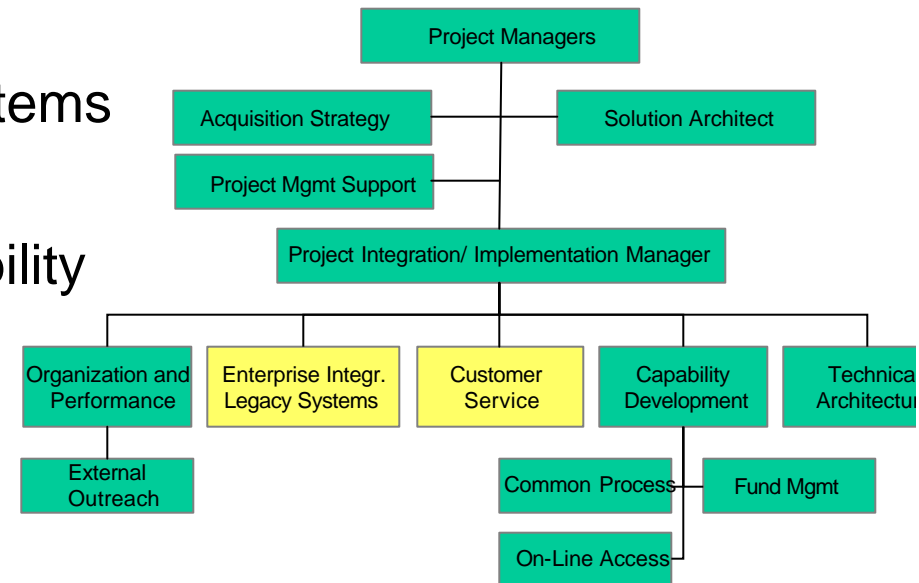


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Enterprise Integration

- ‘Bridge’ to PELL & LOS Legacy Systems
- NSLDS, ED Express
- Requirements and Design Compatibility
- SFA/Legacy Best Practices
- Regulatory and Statutory Impact Tracking
- Contract Maintenance



Customer Service

- Involves significant work w/ Legacy System operations to determine scope of COD release(s)
- Close integration w/ Total System development
- Affected by data migration strategies employed

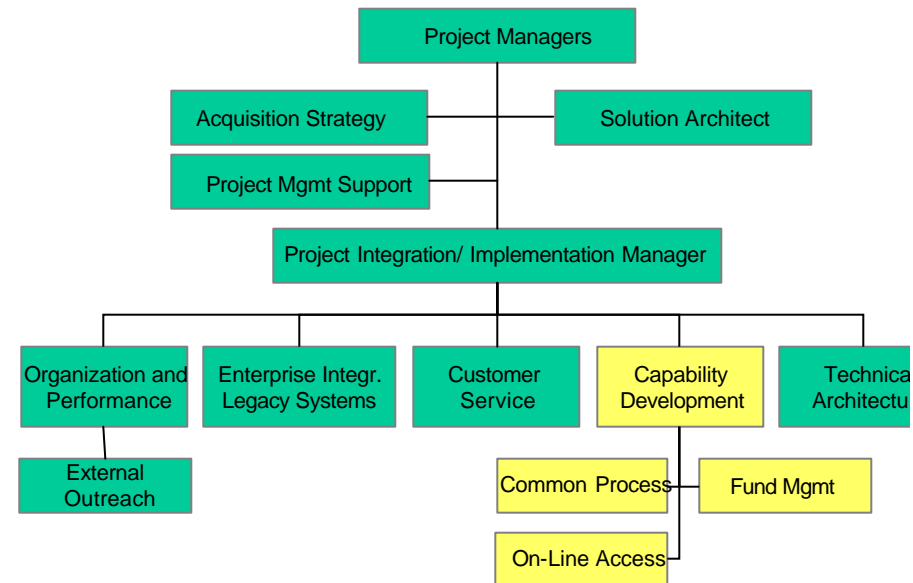


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Capability Development

- Functional Requirements Definition
- Detailed System Design
- TS2 Adaptation / Application Development
- Configuration Management
- Production and Operating Capabilities
- Publications (Tech Ref, SFAH, etc)
- Performance Support (Training, Communication)



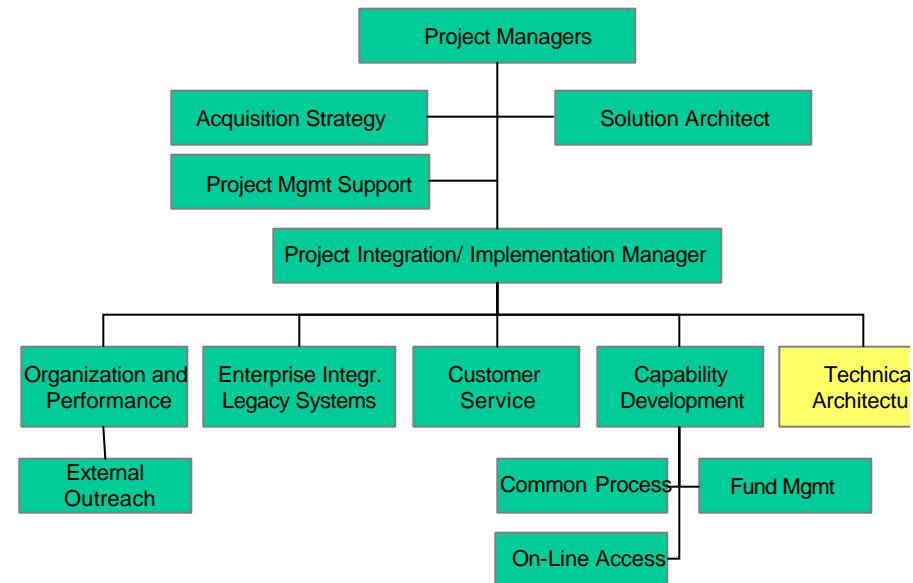


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Technical Architecture

- Requirements Standards
- Security
- EAI Bus
- TSYS Data Link
- VDC
- I/F Standards
- Data Migration
- Reporting
- Environments
- Performance Design





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“COD will be a major step forward for us. It means the integration of some of our common processes—saving money and eliminating redundancy. It will be better for schools, lenders, guarantors, and ultimately, for students.”



- Greg Woods





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COD and the Service Standards

Kay Jacks



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The SFA Service Standards

- Be Worthy of Trust
- Be Courteous
- Deliver Great Products and Services
- Be Efficient



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Be Worthy of Trust

Trust is a felt sense of safety.



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Be Courteous

1. The Student Is Not Always Right, But He Or She Should Always Be Treated With Respect
2. Treat each student as a VIP, meaning a Very Important Person
3. Be proactive by Being Assertively Friendly
4. Show courtesy in the face Of Discourtesy



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Deliver Great Products and Services

1. Plan your work, work your plan.
2. Measure performance.
3. Create strong communication systems.
4. Do the right job, not just the job right.
5. Steer more, row less.



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Be Efficient

- Operational Readiness--Actively anticipating
- Productivity--Use Resources Better
- Working Smart--Smarter not faster
- Seamless--Make it effortless and transparent to the student



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The SFA Service Standards

- Be Worthy of Trust
- Be Courteous
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Applying the Service Standards to COD

- Remember who the customer is.
- Communicate!
- Partner effectively to meet deadlines.
- Remember that it is about changing the way people do business.



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Applying the Service Standards to Your Role

- Treat every customer with respect
- Deliver on your promise
- Focus on effectiveness
- Look for ways to lower cost
- Challenge your team members to live the standards



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Closing Remarks



Kay Jacks









